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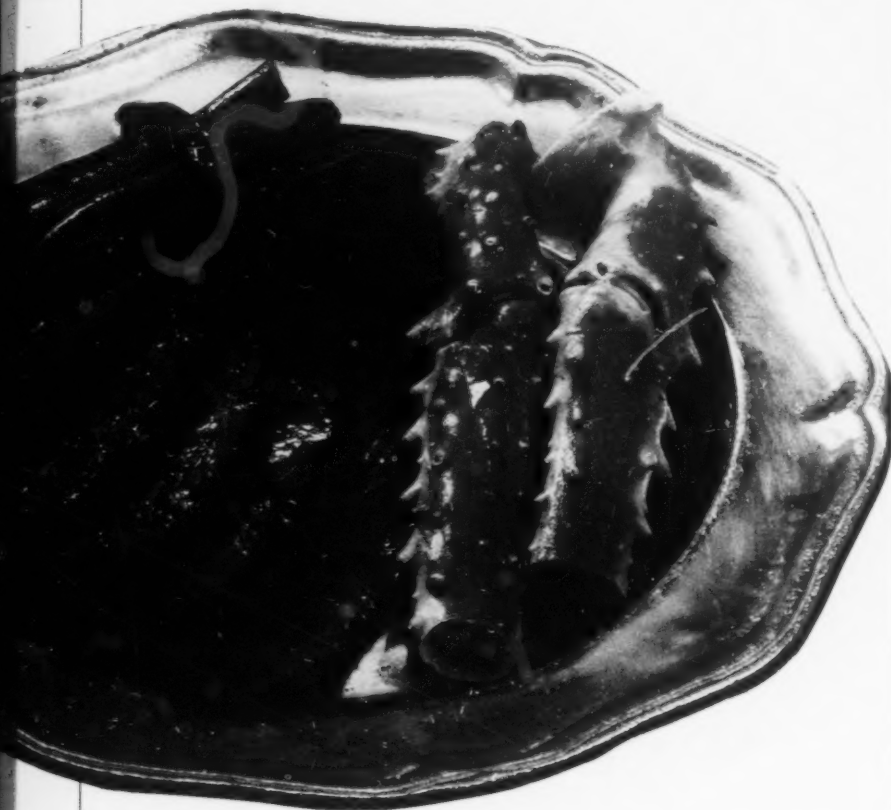
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R&I REPORT



After 1988 taxes are filed, corporations may scrutinize business expenses more closely.

■ TAXES

CREST: Business Meal Sales Off 18% in 1987

Data show upscale restaurants hardest hit by 20% cutback in meal deductions.

A little more than a year has passed since the 1986 tax reform legislation went into effect, limiting deductions for business-meal expenses to 80% of the expenditure.

The restaurant industry, especially high-ticket independent operations that rely on the longstanding tradition of making business deals while breaking bread, has been concerned that the new tax law would have an adverse effect on expense-account-related spending.

Now, according to analysis of data by George Rice, president of GDR/CREST Enterprises, it appears the

industry's fears are well-founded. Total industry sales attributable to business expenses declined 18% in 1987, CREST reports. If the figures merely represented the continuation of a trend, the news might not come as a shock. But the 18% decline comes on the heels of substantial business-meal spending gains reported by CREST in both 1985 and 1986.

"We are disappointed, but not surprised," says Bill Fisher, executive vice president of the National Restaurant Association. "Our disappointment goes back to

Congress, because we told them what the likely adverse outcome would be. Now the data show there was a significant impact."

Ted Balestreri of the Sardine Factory in Monterey, Calif., says, "Business-meal activity has certainly declined. I have noticed more conservatism at corporate banquets. Instead of ordering the \$20 bottle of wine, businessmen order the \$7 bottle. It will take an even bigger toll after companies do their '88 taxes and realize what the 20% reduction costs."

When examined by daypart, lunch and dinner account for the largest share of expense-account revenue. Revenue declines were

greatest at breakfast (-23%) but this daypart represented only 8.6% of total business-meal sales. Lunch represented 41.5% of the total and suffered a 17% loss in business from 1986 to 1987. Supper revenue, representing 47.1% of the market, slipped 19% in 1987.

Alan Tutzer of L'Escargot in Chicago says his dinner business was down 5% to 10% in 1987 and he attributed the loss to lighter convention business. "In 1987, I think there were fewer travel days and lower attendance at conventions in Chicago than anticipated," says Tutzer. "That has probably attributed as much to the downturn as the 20% cut in the business-meal deduction."

Exactly how much of the 18% decline can be attributed to the "80-20" law?

A spokesman at IBM says there has been no specific company policy instituted in reaction to passage of the law last year. He added, however, in an attempt to stay lean and competitive, IBM has reduced overall discretionary spending with a focus on making sure expenses are justified.

At Chemical Bank in New York, Neil Reyer, vice president of restaurant services, says entertainment budgets are being cut continuously, and executives are being encouraged to save money by bringing clients to the corporate dining room. But again, no policy has been implemented as a result of the "80-20" law.

Jay Brandzel, national tax

George Rice



& RESTAURANTS INSTITUTIONS

PERCENTAGE OF RESTAURANT SALES ON EXPENSE ACCOUNTS (based on CREST estimate of \$140 billion sales in 1987)

	1987	1986	1985
Total	2.53%	3.47%	3.2%
Quick service	1.22	1.44	1.23
Midscale	2.57	3.14	3.15
Upscale	6.85	8.25	7.57

Source: GDR/CREST Enterprises

partner at the accounting firm of Laventhol & Horwath, says he was surprised to hear about the 18% drop. "Accounting procedures have been changed to capture business-meal information, and we are seeing some companies instituting policies to take a closer look at the nature of these expenses and whether they are necessary over a certain dollar amount," says Brandzel. "But I didn't think we'd see an impact until corporations did their 1988 taxes."

Bill Fisher, however, feels the "80-20" law is the only thing he can trace to the decline in business-meal activity.

"1987 was a pretty good economic year," says Fisher. "Unemployment was down, there was some real growth in the economy, interest rates were down by the end of the year. There might have been some trepidation among the public after the stock market crash, but the countervailing research shows Main Street didn't pay much attention to Wall Street. So I don't have a better explanation for that type of drop-off."

Fisher says the NRA will show these numbers to Congress to avoid any further reduction of the business-meal deduction. "We are in a damage-control posture

with regard to meal deductibility," he says. "We will show Congress this information and tell them not to even think about lowering the deductibility further."

While there is uncertainty as to what led to the 18% decline, there is agreement the figures for 1988 could be even worse once corporations and individuals file their tax returns.

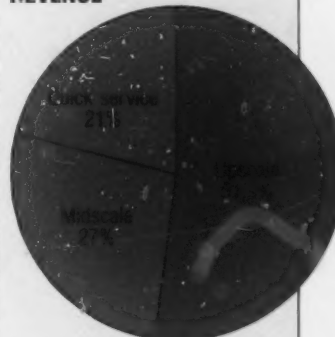
"We are concerned about being more flexible about meeting banquet needs and are coming up with new items that are less expensive," says Balestreri.

Fisher says he hears of dinner houses opening for lunch and is beginning to see more dinner specials and promotions like "frequent diner" programs to help boost frequency and loyalty.

Rice says operators might consider something as simple as creating an awareness of the opportunity a restaurant provides as a good business environment. "Promote elements of decor, sound level and space," he says. "Reserve certain booths and create areas that are conducive to small business meals."

—Jeff Weinstein

TOTAL BUSINESS-EXPENSE REVENUE

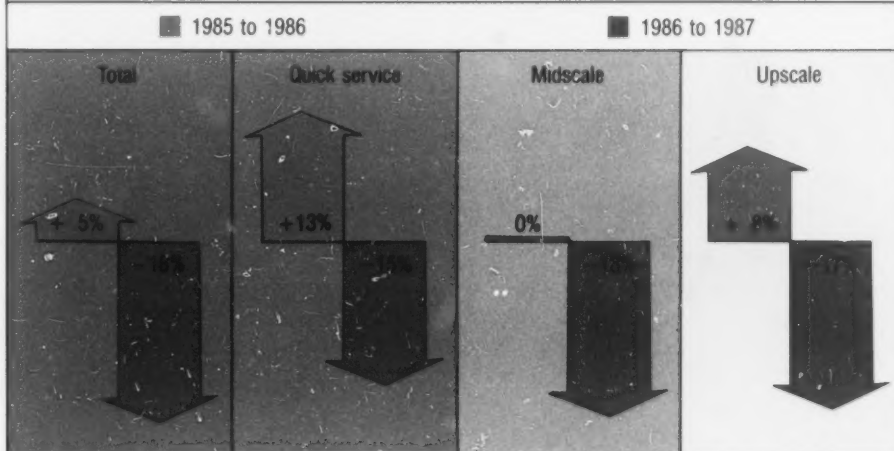


Source: GDR/CREST Enterprises

UPSCALE HIT HARD

Upscale operations accounted for 52% of the expense-account market. The 17% decline in 1987 represents an approximate \$420 million loss in business. Independent operators within the upscale segment are hit the hardest as they account for 75% of expense-account business.

PERCENTAGE CHANGE OF REVENUE FROM EXPENSE-ACCOUNT MEALS



Source: GDR/CREST Enterprises

MENUS

■ R&I DATA

FOOD COST INDEX: COMMODITY FOOD PRICES CAN BE DECEIVING

The market-basket total for March is \$104.36, a decrease of only 20 cents from February. Lettuce is beginning to show a decrease in price, while quality is on the rise. Although butter and Cheddar cheese costs look as if they have increased substantially, this is a result of a sharp price drop of 8% for both last month. Prices are now closer to normal. This is also true for the price of breaded fish portions. Last month's price of \$1.37 was a 20% decrease from January's \$1.71.

		% change		
		3/88	2/88	3/87
Hamburger (lb. 85% lean)	\$1.30	-2		9
Chicken (lb. cut for frying)	.76	-5		-15
N.Y. strip steak (lb./avg.)	3.32	-4		3
Bread (Pullman loaf)	.77	-1		-5
Lettuce (iceberg/head)	1.06	-5		108
French fries (30 lb.)	12.44	7		2
Tomatoes (lb.)	.67	5		16
Milk (gal.)	1.79	15		4
Eggs (doz.)	.62	-5		-17
Peaches (case/#10)	17.41	-1		-5
Peas (case/#10)	10.52	0		-20
Frozen beans (30 lb.)	14.44	2		3
Ice cream (vanilla/gal.)	3.54	-5		13
Butter (lb.)	1.68	19		-9
Cheddar cheese (lb.)	1.64	12		-2
Sugar (100 lb.)	28.25	-5		-12
Coffee (lb.)	2.43	-6		-19
Breaded fish portions (lb.)	1.72	26		-9

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■ FOOD PRICE UPDATE

1988 Outlook Looks Good for Poultry, Seafood, Eggs

In other news, Mother Nature plays havoc with some West Coast produce.

This should be a growth year for the poultry, confectionery and soft drink industries, according to the U.S. Commerce Department.

Following are excerpts from the Commerce Department's "U.S. Industrial Outlook, '88."

Dairy products: Overall industry shipments of \$45.45 billion represented real growth of only 0.6% above 1986 levels, but 1988 should see improvement.

Seafood: Consumer preference for seafood climbs, even as price increases outpace those of competing products. Assuming the national economy continues to grow, per capita consumption could reach 15.3 pounds.

Poultry: According to the Commerce Outlook, poultry has another good year ahead. Per capita consumption in 1988, forecast at 82.8 pounds (retail-cut equivalent), should grow by some 4.6 pounds from 1987. Also, wholesale broiler prices are forecast to

drop to 44 cents per pound in 1988.

Egg: Eggs are expected to be bought at unusually low prices. The volume of eggs in the winter months is about 1% above last winter's volume. This trend is expected to continue through early 1988.

In other news . . . The beginning months of January found the Florida harvest of oranges lagging behind year-ago figures, with just 16.2 million boxes harvested compared to 20.1 million boxes at the same time the previous year. The grapefruit harvest was also running under year-earlier levels . . . The supply of larger sizes of broccoli have been affected by rains and a freeze in California. Supplies of cauliflower also are declining. Part of the decrease can be attributed to a seasonal decline, as most shippers in Salinas, Calif., have now finished for the season, but Santa Maria, Calif., supplies have been reduced by cold weather and rains . . . The International Coffee Organization reduced the global export quota by a million bags in early January. Coffee prices have weakened sharply over the past year as consuming nations are holding more than ample supplies already.

—Kathleen Marshall

Processed of canned orange juice received only 12.4 million boxes of the early varieties of oranges, versus 16.5 million the year before.



FOOD

continued from page 135

Spicy marinades, savory sauces and lively accompaniments spark renewed interest in beef.

KOREAN BARBECUED BEEF

Yield: 4 servings

Soy sauce ½ cup
Sugar 6 Tbsp.
Sesame oil 4 Tbsp.
Pepper ½ tsp.
Green onions, finely chopped 6
Garlic cloves, minced 4
Sesame seeds 1 Tbsp.
Frozen prepared beef kebabs, thawed 4

Method: Mix first 7 ingredients. Pour into a shallow, flat pan; place kebabs in marinade. Cover; let stand for 2-3 hours, turning occasionally. Remove kebabs from marinade; skewer and broil for 8-12 minutes.

GERMAINE SWANSON'S SHAKING BEEF CUBES

Yield: 24 servings

Shallots, pared, minced 4 oz.
Oil 9 Tbsp.
Meat seasoning sauce 6 Tbsp.
Reduced-sodium soy sauce 6 Tbsp.
Garlic, pared, minced 4 Tbsp.
White pepper, freshly ground ¼ tsp.
Beef tenderloin, trimmed, cut into ¾-in. cubes 6 lb.
White vinegar 6 Tbsp.
Sugar 1 tsp.

Boston lettuce, washed, torn into bite-sized pieces 3 gal.

Red onions, pared, ¾-in. dice 2 lb.

Method: Combine shallots, 3 Tbsp. oil, meat seasoning sauce, soy sauce, 3 Tbsp. garlic and ½ tsp. pepper. Add beef; marinate at room temperature for 20 minutes; set aside. Combine vinegar, the remaining 6 Tbsp. oil, the remaining garlic, pepper and sugar. Toss dressing with lettuce; reserve. For each serving: Place wok or heavy skillet over high heat. Add oil as needed; heat to smoking point. Drain 4-oz. beef; add to wok. Stir-fry 2-3 minutes, until medium rare. Add a generous oz. of diced onion; fry until tender-crisp. On serving plate, portion 2 cups lettuce mixture; arrange beef and onion over lettuce.

continued on page 144



Marinated grilled steak is served on corn tortillas with fresh salsa and a sprig of cilantro.

HOTEL DINING ROOMS SELL THE MOST BEEF

While the health-care segment has the highest percentage of operations offering beef, the heaviest beef users, those buying more than \$1,000 a week, fall in the lodging segment.

	On Menu	Heavy Users
Full service	94.1%	32.6%
Fast food	80.7	40.1
Hotel/motel	92.5	42.5
Hospitals	97.5	31.5
Schools/colleges	76.9	18.1
Employee feeding	87.6	38.1

Heavy users purchase \$1,000 or more per week. Source: 1987 Simmons Research.

FOOD

■ HEALTHLINE

Consumers Ambivalent about Nutrition

They want information, but the desire for flavor and familiarity are likely to rule menu choices.

GALLUP SURVEY IDENTIFIES FOUR DINER GROUPS

In the four eating-out styles identified by the Gallup survey, a concern for nutrition barely surfaces.

Casual (30%): Young people (18-34 years old) like casual atmosphere, large portions at low cost. They like fast-food chains, cafeterias, pancake restaurants.

Adventurers (26%): Adults aged 25 to 49 years of age seek variety in atmosphere and menu, availability of alcoholic beverages. They like ethnic and seafood restaurants.

Meat Lovers (24%): Customers 35 and older often consider meat a highly important part of the meal. They like steakhouses and family-style restaurants.

Conventional (20%): Customers of retirement age dine out less often, prefer familiar foods. They like occasional and family-style restaurants.

Restaurant customers want to know more about the food they are eating, but they may not use that information to choose menu items high in nutrients or low in calories, according to The Gallup Annual Report on Eating Out.

Between 1982 and 1986, the proportion of consumers asking for more information about the nutritional value of menu items rose from 18% to 27%. During the same period, the desire to be told about additives and ingredients in menu items jumped by 6% and 4%, respectively. Apparently, customers want more help in identifying healthful menu items than in zeroing in on low-calorie dishes, for the demand to include caloric content on menus remained at about the same level (21%) as four years ago.

This desire for nutritional information, at least among a minority of consumers, has not led to much alteration in eating behavior, however. The Gallup survey showed virtually no change in the number of people ordering dessert, for example. And when given a chance to state preferences in food preparation, people often gravitated to dishes that sounded flavorful or familiar, whether they had impeccable nutri-

tional credentials or not.

When customers were asked to choose a favorite appetizer, for instance, marinated shrimp came in second to calorie-packed Crab Rangoon (deep-fried pastry turnovers with a sweet curry sauce). In the vegetable and salad categories, on the other hand, consumers voted for plain presentations over more elaborate but unfamiliar preparations; fruit salad was the highest-ranking salad, while undecorated corn and green beans beat out zucchini in vinaigrette sauce.

Significantly, the Gallup survey's profiles of four diner groups indicate that nutrition is not a foremost consideration in choosing a restaurant (see sidebar at left). Cost, the decor and general menu appeal are far more important determinants.

The Gallup results parallel those in R&T's latest "Tastes of America" survey. Not only did customers say they were less concerned about nutrition than a year ago, but their behavior followed suit—they were noticeably more lukewarm about eating smaller portions, eating fewer meals, or substituting a salad or appetizer for a traditional entree than they were in 1986.



Pie is a popular dessert choice for "conventional" diners (l.). Followers of a "casual/low cost" food style tend to eat fast food (r.).

FOOD



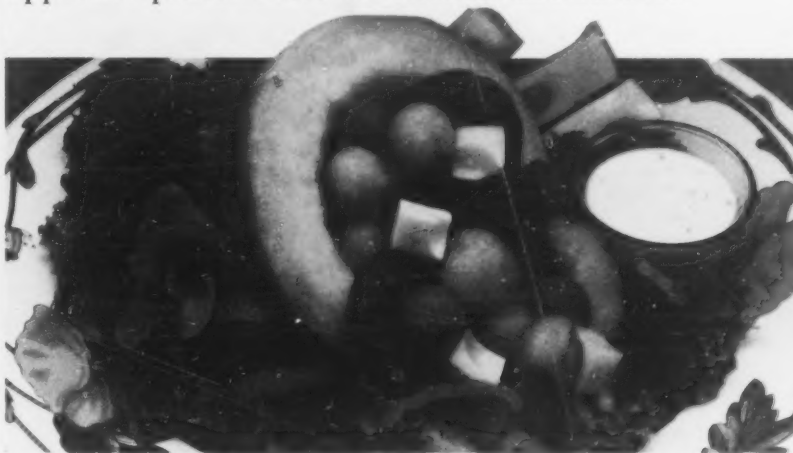
CONSUMERS DEMAND FREEDOM OF CHOICE WHEN DINING OUT

The 1987 Gallup survey shows customers want strict control over the food that goes on their plates:

Change in % points
from '75-'86

Self-service soup bar	+16
Menu variety	+14
Self-service salad bar	+12
All-you-can-eat specials	+ 8
Portion size choices	+ 7
Dieter's specials	+ 2

Self-service food bars and menu variety appeal to practitioners of "situational nutrition."



Enthusiasm for dieter's specials is lower than in 1982.

At the same time, the "Tastes of America" respondents said restaurants should offer more menu items low in sodium, fat, cholesterol and calories. Given the first set of responses, the question of whether they would order those items remains uncertain.

The Gallup and "Tastes of America" surveys were directed to a cross-section of Americans, but research by the magazine *American Health*—whose readers are more health-conscious than average—also shows a gap between intentions and actions. Readers announce goals of cutting back on calories, fat, cholesterol or salt. But at the same time they are buying more fresh fruit and vegetables, and they are bringing home more sweets, snacks and sodas.

American Health identified four common "food styles" among readers: the semi-gourmet restaurant diet, vegetarian diet, weight-conscious Epicureanism and fast-food fans. Although people in all but the last category professed a strong interest in a healthful or low-calorie diet, an analysis of the foods they actually consumed concluded that "fat intake for most diarists was well above the American Heart Association's recommended maximum—30% of calories—and fiber below the National Cancer Institute's recommended 20 to 30 grams a day. Cholesterol was often more than the AHA's 300 mg. daily limit. No diet provided enough zinc. Women were generally short of

calcium, iron, copper, manganese, vitamin B-6 and folacin."

The magazine attributes inconsistent and sometimes unwise menu choices to readers' practice of "situational nutrition." The same person might select salad for a power lunch, lobster for a romantic dinner and ice cream during a self-indulgent mood.

What are restaurants to do, in the face of such erratic behavior? One service they could perform is to help fulfill the consumer's expressed desire for more information on nutrition. Ways to do this are endless: nutritional information on menu items, advice (on request) from well-informed servers, and seminars on diet and nutrition.

They can also satisfy consumers' desire for better control over the food they eat in restaurants, as indicated in the Gallup survey results. Nearly 60% said they want a wide variety of selections on the menu; this amenity is particularly important to men. Interest in self-service salad and soup bars was also up sharply, especially among women.

Although more women than men were partial to the idea of a dieter's plate, this amenity drew a lackluster response (20%) overall. Perhaps customers don't want to commit themselves to the restaurant's conception of a low-cal meal; they'd rather make their own decisions about ingredients and quantity by filling their plates at a food bar.

—Toni Lydecker

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BPA



ABP

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